

Client Needs Analysis (CNA)

CNA interview process and questions for B2B relationships

Process

First meeting Agenda:

- A little about us
 - WHY we came to be
 - WHAT we're hoping to do
 - HOW we carry out what we do
- A little about you
 - WHY you started
 - WHERE you are planning to get to
 - WHAT is the current environment (industry, corporate, political, etc)
- A background or review of how we came together
- This meeting is to discover next steps – if any (be open with this possibility – it takes the edge off)
- It should evolve into the following for the rest of the meeting...

Client Needs Analysis (CNA)

Overview:

1. You want to ask at least three leading questions (more of a conversation) that illuminate their needs in the context of your solution. These should be the three most impactful areas you offer.
2. Each time you ask a question, they may be open and transparent, or defensive, trying to prove they have it figured out. Your response will reflect their choice.
 - If they are positive, make them feel like everyone is in this position
 - If they are defensive, humbly ask for details
3. Close with a summary that will either move to next steps or leave on a good relationship.

Keys to success

- This is conversational and not a hard sale
- Be very specific in the questions so they respond to the exact thing you can fix
- You are first building a relationship, not a sale. People buy from those they trust.
- If you asked your spouse to marry you the first time you met, it likely would have been a “no”. But, if you ask for a date, you might get that. Then, keep going on dates until you get a “yes” to the marriage.
- Be very specific so they very likely don't have it.

Example

Example Interview from a coaching business (with commentary)

So, Zabun, **let me ask you something**, because I'm **curious** about your situation: If something happened that took YOU out of your business for a month or more, do you have leadership processes in place **so that** the business can run on its own?

Once you ask the question, just let them sit with it. What you want is for them to say is... "HmMMM, you know, not really"

NEG. *They might answer they got it... You know they don't. Dig in. Play out the reality. "Oh, wow, you really have that? How do you do it? You're one of the first. Please educate me. I'm always learning and looking for good examples. Please help me see what you're doing.*

It's likely what they explain is nothing like what you are able to do for them.

POS. *If they admit they **don't** have it...*

- Okay, you're definitely not alone in that, believe me; that said, let's put that one on the shelf for now.

OR *Move to the next questions... If they keep insisting it's not that important, you can say*

- Oh, well maybe that's just something you don't really need right now

The key here is to not make them look stupid because obviously every business owner ought to have this. But, at the same time you don't want to sell this either, but you want to make light of it - this is the white flag part. Once you say the part of "...you don't really need right now or..." they should almost immediately say "No, no...that's definitely something I need, I just haven't even had any time to really think about it."

*With either response, you can **move to the next question**... you don't need to resolve these. They will know internally what they need.*

All good, let me ask you this...

We talked a little about leadership process, but I'm curious, when it comes to your top three projects that you have discussed and identified along with your team, you know - **so that** everyone is on the same page, along with clear metrics, roles and budgets, how has that gone for you so far?"

Again, what you want them to say is "Hahahaha....wow...I wish. Honestly, we could be doing a much better job on that" Again, that's what you want them to say or some kind of variation. Then you say,

- Well, maybe at the stage you're in right now, just not that important yet.

Again, you DON'T want to sell, you want them to surrender. Remember, the best idea anyone ever has is the one they came up for themselves. So, you want them to say "No...no, that is extremely important" Then you jump in and say...

- Okay, let's just set that one aside because I have one more question.

So, now that we've talked a bit about leadership processes and project identification, what about your mission and vision as a company? In other words, do you think if you asked each person on your team that same question, they answer it the same - you know, **so that** they are all seeing the SAME big picture and feel confident about the direction of where the company is headed?

As with the questions above, they are almost designed to be rhetorical in nature. What you want is, "Yeah...embarrassed to say this but I don't even know the mission or vision..." Again, jump right in - the point isn't to make them feel bad or look bad and say...

- Hey, don't be hard on yourself whatsoever, many organizations are in the same boat. But, maybe it's just not that important for you at this point.

Oddly enough, this is the reverse psychology in play, and they ought to say something like "No, that is super important I just don't have any time."

Summary

Zabun, I really appreciate you answering some of my questions. Just to summarize so I ensure I heard you correctly:

- You mentioned that having processes in place so the business can run on its own would be good, right?
- That having a few unified projects so everyone is on the same page with clear metrics, roles, and budgets would be nice as well?
- Also, getting defined Vision, Mission, Values and Goals so everyone is aligned around a common direction of the company would really help, right?
- And you said you wanted to learn more about it, correct?

This is designed to give you and them a framework of what the next meeting would be like. Once they agree, you can say...

Okay, so here is what I think we should do, I'd like to put together some very specific ideas around how I can help you and your organization get everything we just talked about. Can we meet sometime next week or the week after?

Or

I'd like to get some time to explore these things deeper with you. To see if maybe we can work together. If we could get everyone playing from the same book, would that be good for you?

Worksheet

Your Turn

What are the three areas you know you can make a huge difference in their business and/or life?

1. _____

2. _____

3. _____

Phrase a question for each area that will give them little choice but to say “no, I don’t have that.”

1. _____

2. _____

3. _____

What are the next steps you want them to take and a summary to make this happen?

1. _____

OR

2. _____